The Quality of the Media: Schweiz - Suisse - Svizzera: Yearbook 2018: Main finding

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Yearbook 2018

The Quality of the Media

Digest: main findings

Schweiz Suisse Svizzera

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Digest: main findings 2018
The Quality of the Media – Switzerland

Swiss information media under the influence of digital-driven structural change

The trust of the Swiss in the domestic professional information media is high. Of the thirteen countries surveyed, Switzerland, together with Sweden and the Netherlands, is among the top performers in this respect (Reuters Institute, 2018). The intact trust is an expression of a still predominantly good media quality, as we were again able to ascertain through our analyses this year. However, the digital-driven structural change of the public has accentuated itself during the year under study. Because of platformisation - i.e. the increasing influence of global

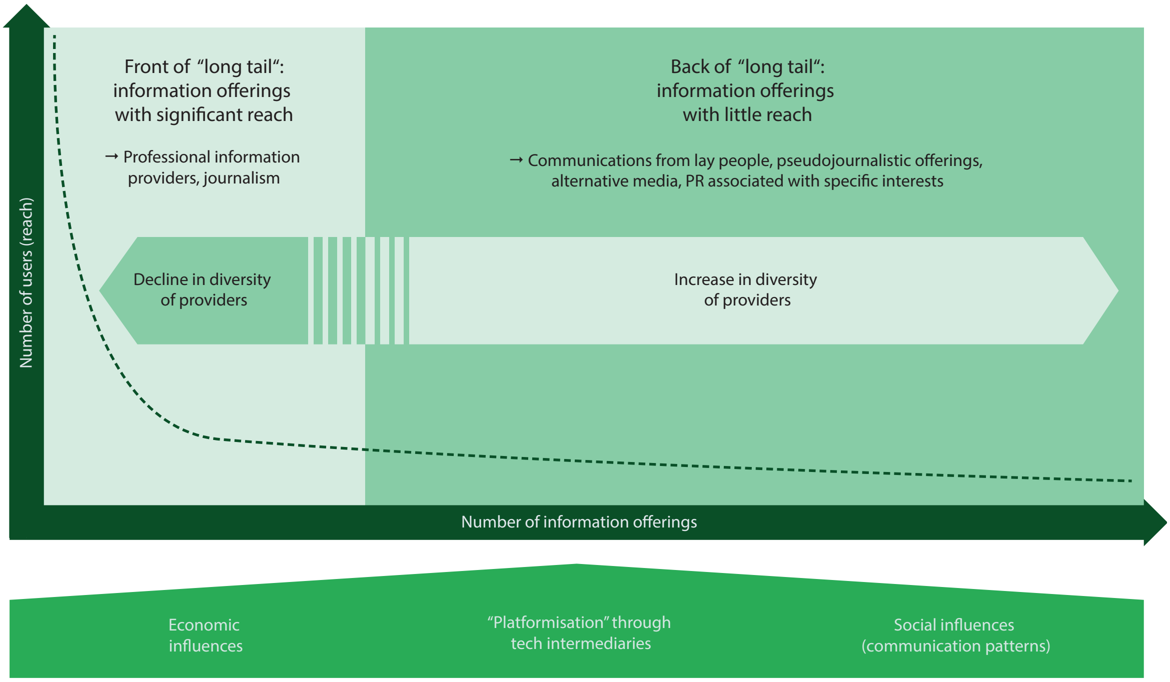

Diagram 1: "Long tail" public sphere in the digital age

The "long tail" public sphere within the online realm is defined along the horizontal axis by the quantity of media and information providers and along the vertical axis by the reach achieved by these providers. While an increasing level of media concentration can be observed at the front of the "long tail", the back is seeing a growth in the diversity of pseudojournalistic offerings. It is a case of the "long tail" public sphere feeling the growing influence, in both economic and social terms, of the platforms owned by global tech intermediaries (Facebook, Google, etc.). In economic terms, there is an increasing flow of advertising money to global tech intermediaries. And in social terms, the tech platforms are promoting an unbundling of media consumption, which is no longer centred around the brands of professional information providers. Both these phenomena are tending to undermine professional information-based journalism.

tech intermediaries such as Google and Facebook - the Swiss information media have lost further ground and are in a downward spiral. The proportion of journalistic employees has been falling steadily since 2011, while the proportion of employees in the PR sector is growing as steadily. In addition, the section of the Swiss "long tail" public with high reach shows a worrying media concentration (cf. Diagram I.3).

The development of centralised editorial departments and systems of sub-edition has resulted in a marked loss of diversity in the media arena in the areas of national and international political, economic and cultural reporting. This affects precisely those topics that are of vital importance for the democratic community in Switzerland. In addition, digital-driven structural change is accompanied by a fundamental revolution in media use at the expense of professional information media. In 2018, the group of so-called "news deprived" reached a record value of 36%, making it by far the largest media user group in Switzerland today. These are people who consume news of mostly inferior quality and only sporadically, and this very substantially via the platforms of the tech intermediaries. Since the willingness to pay is directly linked to the interest in news, the group that gains the most, i.e. the one of the news deprived, is the group that is least willing to pay for news. Platformisation is also accompanied by a change in media logic. This Yearbook shows, for example, that platformisation is linked to a trend towards audio-visualisation. Audio-visual content, namely videos, is rewarded by users with particularly high response rates and is preferred by the algorithms of tech intermediaries.

In the context of these developments and challenges, it is remarkable that media quality in the Swiss media arena remains high. But it is sinking. This is the result of the outflow of human and financial resources. Approximately one third of the 66 media outlets surveyed could not maintain their media quality compared to the previous year. Overall, the system of Swiss information media is under high external and internal pressure. Exogenously, the national media system in Switzerland is increasingly pressured by global media transformations. In the advertising market, the lion's share of advertising money goes to tech intermediaries. And in the journalistic market, audience flows are increasingly channelled to social platforms. Here, the loyalty towards traditional media brands and the willingness to pay are particularly low. Endogenously, the Swiss information media are increasingly under pressure from the rapidly growing group of news deprived, i.e. those users who only demand sporadically news and who have little loyalty towards local media brands. However, individual Swiss publishing houses are also pressuring the information media system. They partially focus their strategies on the non-publication sector and - sometimes without necessity, i.e. despite substantial corporate profits - stop non-lucrative journalistic units, sell them or combine them into network systems. The fact that even profitable business sectors such as online classifieds or online markets are not used to supply information journalism with money weighs heavily. Against the background of these major challenges, the media policy proposals recently presented in the new Mediengesetz appear despondent. Since professional information journalism lacks a sustainable business model, the proposals to expand media promotion do not go far enough.

1 Economic platformisation and outflow of financial resources

The Swiss information media system is coming under several pressures from an economic point of view. There is currently no sustainable business model for information journalism on digital channels. On the one hand, this is due to the extremely low willingness to pay for news - only 12% of Swiss citizens were willing to spend money on online news last year (cf. Chapter II.2.2) - on the other hand, this is due to the weakness of the online advertising market (cf. Chapter II.3.3). Platformisation, i.e. the dominance of

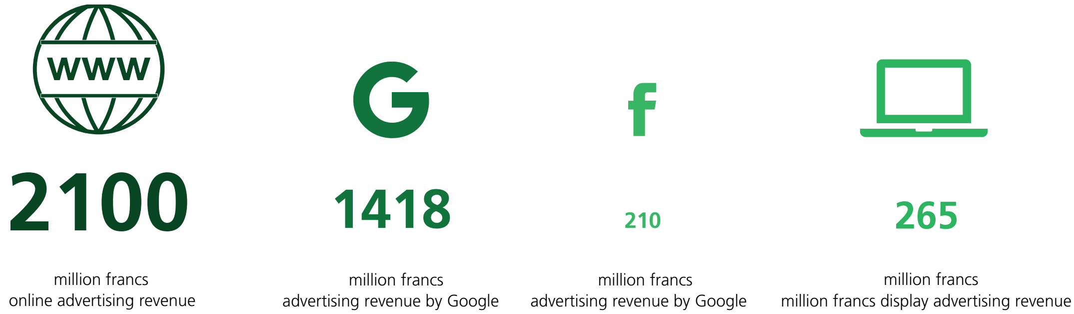

Diagram 2: Advertising revenues in the Swiss online market

The diagram shows the revenues in the Swiss online advertising market in the year 2017 (source: Stiftung Werbestatistik Schweiz, Schweiz am Wochenende 30.6.2018).

Interpretation example: From a total of advertising revenues in the Swiss online market of 2.1 billion francs, 1.4 billion francs flow to Google and 265 million francs are based on display advertising. Following expert opinion, Facebook collected a revenue of around 210 million francs in the year 2017.

global tech intermediaries, is substantially depriving the Swiss media system of advertising revenues. Although online advertising with a total volume of 2.1 billion francs is the most important form of advertising also in Switzerland, the revenues from display advertising, the primary form of online advertising for information journalism, total only 265 million francs. Two thirds (67%) of the revenues come from search engine advertising and thus flow to Google (1.4 billion Swiss francs, Stiftung Werbestatistik Schweiz). So far, only estimates exist for the earnings of social media providers in Switzerland. For Facebook, the estimates assume annual revenues of 210 million francs (Schweiz am Wochenende, 23.6.2018) (see Diagram I.2). Parallel to the growing dominance of tech intermediaries in the online advertising market, revenues from the advertising business of printed newspapers are dwindling. Over the past ten years, they have been reduced by 1.4 billion francs and, at 1.1 billion francs, they amount currently to less than half of the original volume. This means that, in 2017, Google alone earned more in the Swiss advertising market than all the media outlets combined (Stiftung Werbestatistik Schweiz 2018). The developments in Switzerland coincide with international findings. In the USA, too, the majority (63%) of online advertising revenues are generated by Google and Facebook (eMarketer 2017).

2 High media concentration and growing politicization

With die Republik and Bon pour la tête, two prestigious information media projects have recently been launched to enrich the Swiss media arena. However, this should not obscure the fact that the media concentration in Switzerland is alarmingly high, especially against the background of the weak earnings in information journalism (cf. Chapter II.3.4) With regard to the diversity of providers, the three largest providers dominate more than 80% of the press market in German-speaking Switzerland, as much as 90% in the French-speaking part of Switzerland and a considerable 61% in the Italian-speaking part of Switzerland. In the online sector, the big three dominate 71% of the market in German-speaking Switzerland, 87% in French-speaking Switzerland and 88% in Italian-speaking Switzerland (see Diagram I.3).

The concentration of providers continued to increase during the analysed year. For example, with the takeover of Zehnder Regionalmedien AG by Zeitungshaus AG (formerly BaZ Holding AG), another Swiss publishing house has disappeared. At the same time, the event is an indication of the growing politicization in Swiss information journalism. The structurally weakened

media system creates opportunities for financially strong investors with political interests, primarily from the right-wing conservative political spectrum. With the takeover of Zehnder Regionalmedien AG, 25 local media are transferred to the Blocher family. This means that 800,000 Swiss households in politically interesting areas - i.e. agglomerations as interfaces between rural and urban regions - can be provided with journalism and advertising in one fell swoop. The fact that the free weekly newspapers have also been used for political purposes since the change of ownership has already become apparent (watson.ch, 8.8.2018).
In addition, media concentration has now also affected the advertising market. Because of the bankruptcy of the advertising broker Publicitas, only two large advertising associations, Tamedia/Goldbach and Admeira, remain in the market. This is to the detriment of smaller media outlets that can no longer sell their advertising space via an independent partner of critical size. The suspension of the Giornale del Popolo in Ticino must be interpreted because of the bankruptcy of Publicitas.

3 Centralised departments cancel out journalistic competition

However, the diversity of providers does not describe media concentration in Switzerland exhaustively. The rapid increase in the number of journalistic network systems, sub-editions and centralised editorial departments is also decisive. In this context, 2018 was a key year. At the beginning of 2018, Tamedia set up two centralised editorial departments for German- and French-speaking Switzerland each, which now supply twelve daily newspapers and two Sunday newspapers with content in the domestic, foreign, economic, cultural, sports and knowledge departments. With the sale of the Basler Zeitung to Tamedia centralised content production from Tamedia continues to gain in importance. The NZZ media group and AZ Medien AG have decided on a joint venture under the name CH Media, which provides the merger of the regional newspapers, the corresponding online portals and the unlicensed radio and TV stations. Also, Somedia has followed suit and announced a central editorial office for the two previously independently run, traditional regional newspapers Südostschweiz and Bündner Tagblatt.
Publishers emphasize that from the reader's perspective such network systems mean an improvement in quality because human resources and journalistic know-how can be bundled in centralised editorial departments. However, this is a short-sighted view. Negative consequences at the societal level are not considered. The auto-

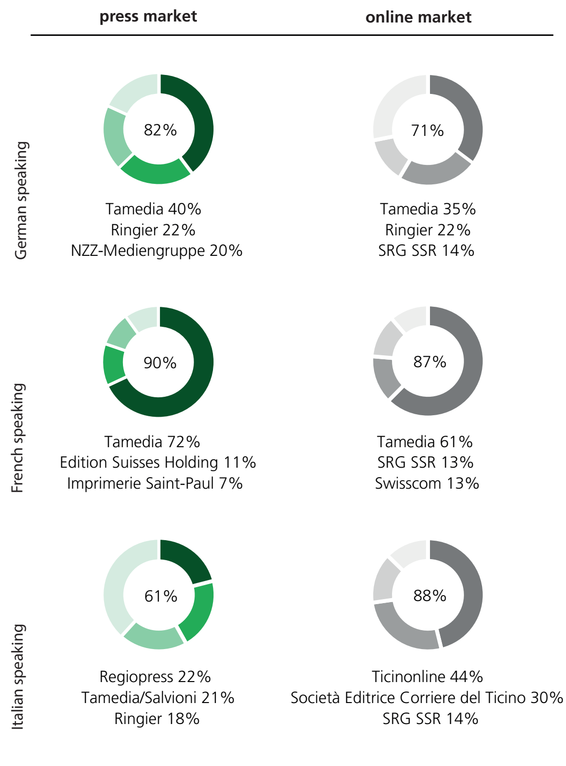

Diagram 3: Concentration in the Swiss press and online market
The diagram shows how dominant the three biggest controlling parties are in the specific market in the year 2017 (source: WEMF, NET-Metrix). All the press and online outlets with a reach over 0.5% in the corresponding linguistic region were considered.
Interpretation example: In French-speaking Switzerland, the largest three publishing houses control 90% of the entire press market in the year 2017.

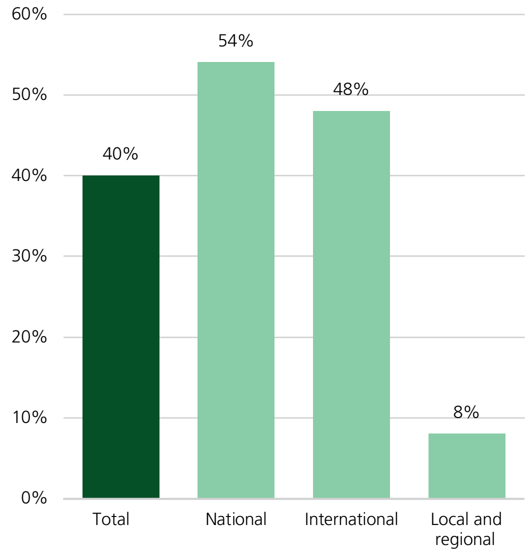

Diagram 4: Proportion of shared articles in political reporting

The diagram is based on the proportions of shared articles in the national, international, local as well as regional political reporting. We consider articles as "shared" if they were published in at least two of the analysed media outlets. The present analysis considers twelve daily press outlets from German- and French-speaking Switzerland for six random sampling days between 1.1.2017 and 31.8.2018 (n = 8936).

Interpretation example: Over half of the articles (54%) of national political reporting were published in more than one outlet.

mated text comparisons carried out for the first time for this Yearbook using the Jaccard coefficient to determine identical or different content in the press arena show that editorial cooperation significantly reduce the journalistic diversity in Switzerland (cf. Chapter III.2.1). Particularly in the area of national and international political reporting, which is central for democratic politics, the journalistic diversity is declining markedly. In the surveyed Swiss press arena, 40% of the articles published in the field of political reporting are now printed simultaneously in at least two press outlets (cf. Diagram I.4). The number of articles published several times in the areas of international (48%) and above all of national political reporting (54%) is particularly high, while reporting on local and regional politics (8% articles reprinted several times) is still largely independent. Editorial cooperation between subscription newspapers have a negative effect on the diversity within the media arena. If one restricts the focus to network systems such as the one of Tamedia, between Tages-Anzeiger, Bund and Berner Zeitung, their effects are very meaningful in a chronological perspective: 51% of the articles were published in several outlets before the introduction of the centralised editorial departments, after, this proportion rose to 62% (cf. Diagram I.5). In editorial reporting, this proportion rose considerably by 17 percentage points from 38% to 55%.

Overall, network systems reduce the diversity of topics and perspectives, primarily in national and international reporting. In addition, the regional perspective on national and international processes is restricted if the editorial offices of the network produce political, economic or cultural reporting for various regional newspapers in a centralised manner. Particularly problematic

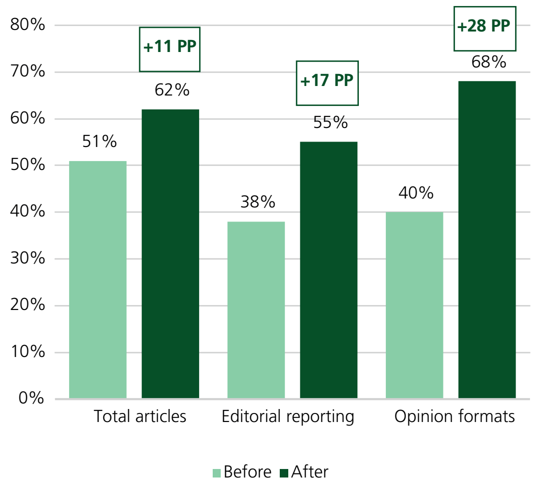

Diagram 5: Proportion of shared articles in the journalistic network between Tages-Anzeiger, Bund and Berner Zeitung

The diagram shows the proportions of shared articles out of the total reporting within the journalistic network between Tages-Anzeiger, Bund and Berner Zeitung. The proportion of shared articles is indicated for total reporting, for editorial reporting and for opinion-based formats (editorials, comments and reviews). The period before and after the introduction of the centralised editorial department (1.1.2018) are compared to each other (analysed period: 1.1.2017 until 31.03.2018; n = 1634).

Interpretation example: 40% of the opinion-based reporting in 2017 were published in at least two outlets of the journalistic network between Tages-Anzeiger, Bund and Berner Zeitung. This value rises in 2018 by 28 percentage points up to 68%.

Tages-Anzeiger, 26.5.2018 Der Bund, 26.5.2018 Berner Zeitung, 26.5.2018

Diagram 6: Identic editorial in Tages-Anzeiger, Bund and Berner Zeitung
The diagram shows an editorial from 26.5.2018 concerning the «Vollgeld-Initiative» that was published identically in the Tages-Anzeiger, Bund and in the Berner Zeitung (source: SMD).

from a perspective of democratic theory is the fact that editorial network systems lead to increasingly uniform reporting in opinion-oriented formats. This shows in direct cooperation effects. In the network of Tages-Anzeiger, Bund and Berner Zeitung, the number of shared opinion-oriented articles, i.e. editorial articles, commentaries and reviews, rose from 40% to 68% with the introduction of the centralised editorial department (cf. Diagram I.5). The probability that the same voting recommendations will be made in different newspapers, e.g. before votes, or that uniform criticism will be voiced in the event of scandals, is growing (cf. Diagram I.6). The loss of diversity in the area of voting and election-related expressions of opinion is all the

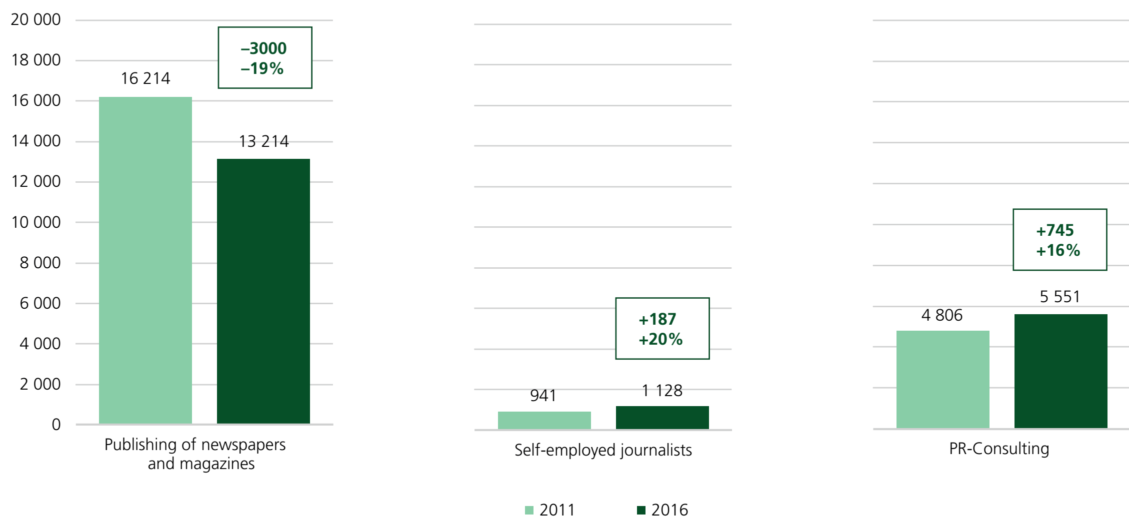

Diagram 7: Number of employees by sectors
The diagram shows the number of employees by year and sectors. The data is based on Statistik der Unternehmensstruktur (STATENT), which registers all businesses with a duty to pay AHV contributions for their employees (or for themselves in case of self-employment). For the present analysis, the numbers describing "institutional entities" for the NOGA-Codes 581300, 581400, 9003003 and 702100 were used. The data for the years between 2011 and 2016 is currently available (cf. Federal Statistical Office FSO).
Interpretation example: In the year 2011, the number of employees in businesses whose core activity was the publishing of newspapers and magazines including journalistic activities (online or print) amounted to 16,214. Five years later, in 2016, this number decreased by 19% to 13,214.

more problematic because newspapers are still the preferred sources of information in the course of referendum campaigns (cf. Voto-Studie, Tresch et al. 14, 2018). Overall, journalistic competition, an indispensable prerequisite for quality, is severely impaired by editorial network systems. This increases the danger of journalistic mistakes because the control function between outlets is weakened.

4 Brain drain in journalism, growth in the PR sector

The growing weakness of earnings in information journalism as a result of advertising outflows to tech intermediaries and the low willingness to pay for news has the consequence that the number of media professionals is constantly decreasing (cf. Chapter II.3.2.) The proportion of employees in online and press media has fallen by 19% since 2011 (Federal Statistical Office FSO). Thus, 3000 jobs were lost in five years (see Diagram I.7). By contrast, the proportion of employees in the PR sector increased by 16% over the same period. The proportion of self-employed journalists is also growing substantially, namely by 20% since 2011.
The economically difficult situation in professional information journalism thus promotes a tendency in which more and more journalists either “change sides”, i.e. pursue a new occupation in the PR sector, or seek their fortune as freelancers, mostly under difficult and uncertain conditions in the long term. Due to the economically precarious situation, many freelancers move between journalism and PR. This further weakens journalism that is relevant to society and committed to public general interest. While a growing brain drain is noticeable at the front of the “long tail” public, where information media with a high reach are located, PR based on interests is gaining in importance at the back of the “long tail”. The statistics thus show that processes which have recently been subjected to more critical scrutiny have taken place: Tamedia is preparing job cuts against the background of the newly created centralised editorial departments. Staff cuts are also expected in the joint venture between AZ Medien and NZZRegionalmedien. The SRG SSR has also announced that it will cut 250 full-time positions over the next four years. And at SDA - which provides an indispensable basic service for the Swiss media system in times of precarious resources - 40 full-time positions are being cut. It is to be expected that several hundred positions in Swiss information journalism will be lost in the very near future alone. A problematic development from a democratic point of view.

5 Social platformisation: emergent media consumption and filter bubbles

Most Swiss people receive their news from the Internet. Online news sites are the main source of information for 33% of users and social media for another 10%. Almost half of the Swiss, i.e. 43%, already receive news mainly from digital sources (cf. Chapter II.3.1). Digital channels have thus overtaken television (31%), which had dominated for a long time as the main source of information. This effect is even more pronounced among young adults aged 18 to 24: Three quarters of this age group receive news from the Internet. In international comparison, the Swiss population shows an affinity for digital news. Together with Norway (45%) and Sweden (44%), Switzerland is one of the few countries in Europe where news sites are more important than television as the main source of information.
Social platformisation, i.e. the consumption of news via platforms of tech intermediaries, is also progressing rapidly. Whereas in 2017, 45% of respondents said that they regularly access news via social media, by 2018 this figure had risen to 50%. Almost a quarter of young adults aged 18 to 24 obtain information mainly from social media. The growing importance of platforms

Brand-based news consumption

Accesses online news primarily as bundled offering through the news site; strong brand loyalty towards information media

Older than 35 years
Rather male
Lives rather in German-speaking Switzerland
Strongly interested in news
Less active on social media
If social media, then Twitter
Prefers text-based news formats
High understanding of interrelations in the media sector
Higher trust in media

"It is important for me to know what happens on the globe. You could call me a news-junkie. I like to surf on the news sites I trust, or I simply read the good old newspaper. Sure, I do have a Twitter account and from time to time I look through it. That's quite interesting but otherwise I am not very fond of social media."

Emergent news consumption

Accesses news articles primarily as individual articles within a feed on social media; weak brand loyalty towards information media

Between 18 and 34 years old
Rather female
Lives rather in French-speaking Switzerland
Not very interested in news
Very active on social media
Very often on Facebook
Would like to see more video formats
Low understanding of interrelations in the media sector
Lower trust in media

"So many things are happening, I can't keep up with it. I think somehow it is important to be informed. If I am really interested in something, I look for information on the Internet. I like most to get inspired by topics on Facebook. There, I regularly find cool stories or videos that absorb my attention."

Diagram 8: Online news consumption – comparison of types
The diagram visualizes the emergent news consumption as well as the one based on brands in direct comparison (source: Reuters Digital News Report, 2018) (images: Unsplash, photos by Roman Kraft and Becca Tapert).
Interpretation example: The user of emergent news is, in comparison to the brand-oriented type, characterized by his or her younger age, the fact that he or she more often lives in French-speaking Switzerland and that he or she consumes news more often on Facebook.

such as Facebook, Google, WhatsApp, Snapchat and Instagram is changing the way news are consumed. They are being used less and less as a bundled overall offering of specific media brands such as 20minuten.ch, watson.ch or nzz.ch. Instead, the importance of unbundled, so-called emergent media consumption is increasing (cf. Diagram I.8). The users receive via algorithms highly dynamic article clusters from various sources - professional as well as non-professional. Although classic, brand-supported media consumption is still relevant in Switzerland at the moment, almost a quarter of Swiss people (23%) already consume news predominantly in an emergent manner via social platforms, news aggregators or by entering keywords in search

engines. Emergent news consumption is most pronounced among young adults between 18 and 24 years of age (28%) (cf. Chapter V.2.1).
This development is problematic for traditional information media providers. Emergent media users do not associate news with content producers, i.e. traditional news providers, but with the platforms of Facebook, Google and co. (Kalogeropoulus and Newman 2017). Under this trend towards "homeless media" (Marconi 2015), brand loyalty to traditional news providers is suffering. And this additionally limits the already low willingness to pay for online news.
Our Twitter study also shows that emergent news consumption increases the probability of filter bubbles, i.e. that users move to different information islands (cf. Chapter V.2.4). Even if they use the same media. While the German right-wing community primarily shares NZZ articles on Angela Merkel's refugee policy, the Swiss Twitter community consumes and shares completely different NZZ content. Platformisation and the associated increase in emergent media consumption thus reduce the integration function of media communication. The probability increases that people live in diverging information worlds. The problem of filter bubbles has recently been greatly relativized in the scientific discourse (e.g. Barbera et al. 2015). However, this may also be related to measurement problems. Our study shows that overlapping media usage in terms of outlets does not mean that the

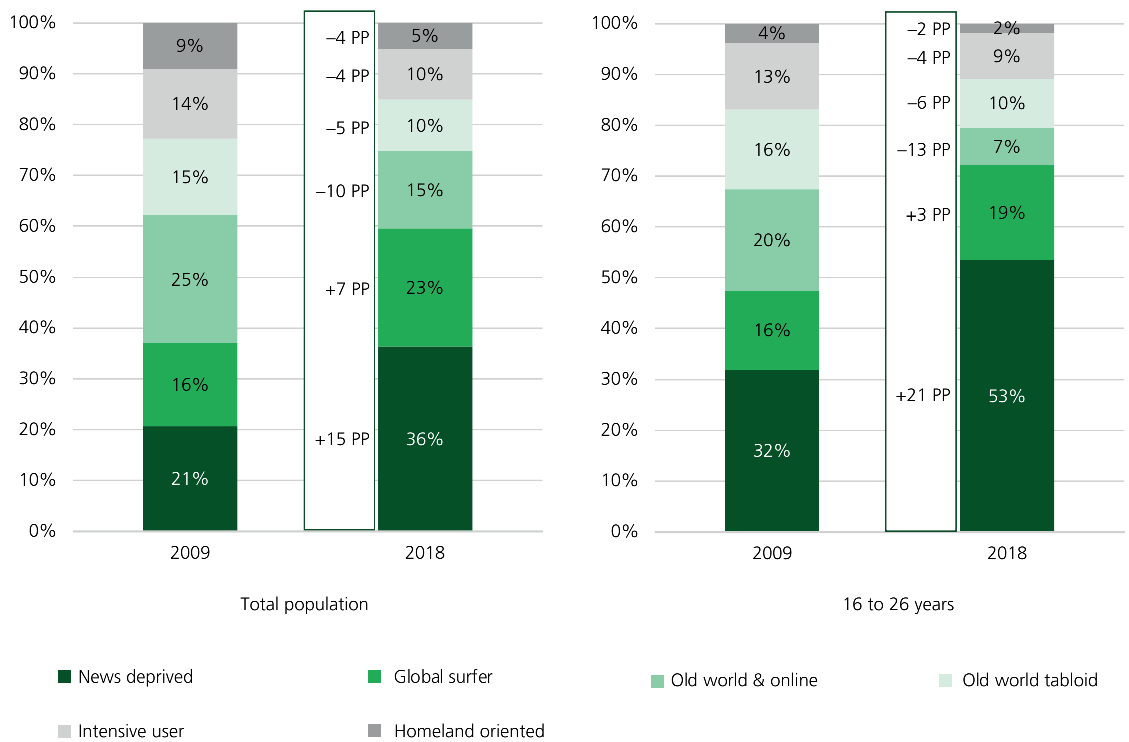

Diagram 9: Changes in the proportion of news user types between 2009 and 2018

The diagram shows the proportions of news user types among the total Swiss resident population (left) and the persons aged between 16 and 29 years (right) in temporal comparison (source: GfK Switzerland / fög cf. chapter "Methodik"). An elaborate description of the different user types can be found in chapter II.2.1.

Interpretation example: Within the total population, the proportion of the news deprived increased between 2009 and 2018 by 15 percentage points to 36%. Among young adults, the proportion of this user type is even more pronounced (35%). Compared to 2009, the proportion increased by 21 percentage points.

same content is consumed. Use of the same media outlets, such as nzz.ch, watson.ch, 20minuten.ch etc., does not mean that the same articles are read. Valid research on the problem of filter bubbles therefore requires measurement methods that capture the overlapping or diverging media consumption of user groups at the article level.

6 News deprived become more numerous

In the course of digital-driven structural change, not only is there a shift in the use of news to online channels - and social platforms as news providers and emergent news consumption are gaining in importance -, more and more users are also turning away from information journalism altogether. Since 2009, the number of the so-called "news deprived" has increased steadily and significantly (cf. Chapter II.2.1). These are users who consume little, and if at all poor-quality information media predominantly on social media. Of all the user groups surveyed, the one of the news deprived has grown most strongly in the last ten years. Compared to the previous year alone, the number of news deprived increased by a further 5 percentage points and, at 36%, they represent by far the largest user group in Switzerland today. If we zoom in on the age group between 16 and 29 years, more than half, i.e. 53% of young adults are classified as news deprived (cf. Diagram I.9).
Temporal displacement effects are likely to be of central importance for the growth of the group of news deprived. The news deprived are quite interested in media and invest a lot of time in their consumption, yet not for news purposes. Instead, other media activities dominate, such as socializing, i.e. the exchange or chatting with acquaintances and «friends», or the use of media for entertainment purposes. A general change in use is noticeable here: Today, most of the time is spent in Switzerland with offers from globally active companies such as Google, Facebook, Youtube, Instagram or WhatsApp. Four times more usage time is invested in these services than in the five most frequently used websites among the Swiss media combined (Erläuternder Bericht zum BGeM-Vorentwurf 2018, p. 10). The paradoxical situation arises that the time spent consuming media is increasing, but as a result of alternative media activities less and less time is invested into news about societally relevant events. The low level of investment in news consumption has effects on the image that the news deprived get from society. Socially relevant topics in the areas of politics and economy receive far below-average attention. But the attention for soft topics such as music or lifestyle is pronounced. The user group of "global surfers" has also increased strongly in recent years and, with a share of 23%, it is now the second most important user group in Switzerland. Global surfers are also very inclined towards online offers. However, they do not ori-

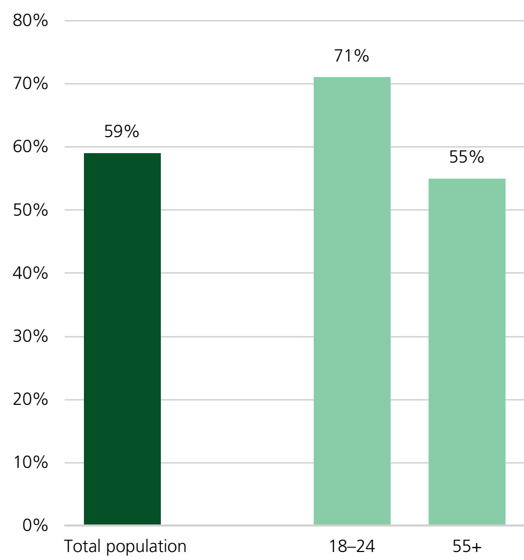

Diagram 10: News video use by age groups
The diagram shows the proportion of persons who state to watch regularly news videos, i.e. "last week", among the total Swiss population and for specific age groups (source: Reuters Digital News Report 2018).
Interpretation example: Among persons between 18 and 24 years old, 71% state to watch regularly news videos.

ent themselves toward Swiss media brands, but international ones. With the news deprived and the global surfers, exactly those two user groups that are least willing to pay for Swiss information journalism have grown the most. This unwillingness originates for the news deprived in their low news interest, for the global surfers in their orientation to foreign media brands.

7 Social platformisation: trend towards audio-visualisation

In addition to the increased channelling of audience flows to social media, social platformisation is also accompanied by a change in media logic. In general, the algorithms of social platforms favour content that provokes many user reactions. This includes both emotional and audio-visual content. Our analysis shows, for example, that news videos on social media trigger an above-average number of reactions. In fact, they are very popular today. Almost 60% of Swiss people regularly consume news videos. The popularity of audio-visual content is particularly pronounced among young user groups: 71% regularly use news videos on news sites or via social media (see Diagram I.10). Youtube and Instagram belong to the favourite social media channels among young adults. 81% of the persons between 18 and 24 years old already use the video platform regularly, and 63% claim to have used Instagram "last week".

The popularity of these image-heavy formats is also evident regarding the use of social media for news purposes. Here, too, Youtube (34%) leads the list of top social networks among young adults (cf. Diagram I.11). Compared to the previous year, the proportion of those who use the video platform for news increased by 4 percentage points. For Instagram, the increase (+9 PP) is even more pronounced compared to 2017.

The professional information media do not respond consistently and timely to the dynamics of the increasing audio-visualization. 10 out of 34 broadcasters surveyed do not have their own Youtube channel. Snapchat, which is very popular among young adults - 61% regularly use the platform - has so far only been used by very few Swiss media outlets (cf. Chapter IV.2.2) Furthermore, none of the analysed information media uses Snapchat specifically as an information or news channel. There is a need to catch up here, also to counteract the trend of increasing news deprivation among young adults. Professional information providers must be present where (young) users are. This is also necessary because on social platforms, such as Youtube, contributions with a conspiracy-theoretical character sometimes trigger exorbitant click rates and an enlightening counterweight by professional media professionals is urgently needed (Repub-

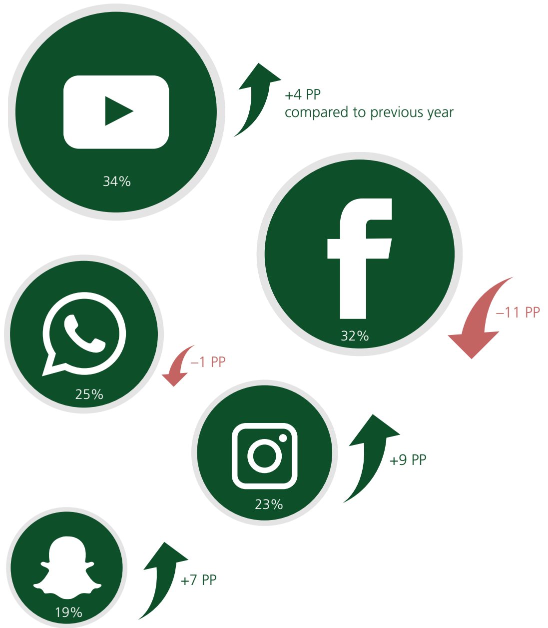

Diagram 11: News use via social media – top channels among persons between 18 and 24 years old

The diagram shows which social media channels young adults (18 to 24 years old) most often use for news. In addition, change in comparison to the previous year is indicated (source: Reuters Digital News Report 2018) (Icons: designed by Freepik).

Interpretation example: In Switzerland, 23% of young adults state to have used Instagram for news in the "last week". Compared to 2017, this proportion increased by 9 percentage points.

lik, 31.7.2018). The professional information media do not yet fulfil their watchdog function in the wild of the “long tail” net, this also applies to public broadcasting with a public service mission.

8 Good media quality, but it’s declining

Media quality in Switzerland was high in the year under review. But it sinks (cf. Chapter II.3.5). The outflow of financial and personnel resources is linked to the quality of journalism in Switzerland. Approximately one third of the 66 media outlets examined could not maintain their quality compared to the previous year (cf. Diagram I.12). Losses can be registered in the diversity of content concerning the subject areas covered, but also in the provision of context. The newly included Wochenzeitung immediately makes it to the fourth place in the overall ranking and even barely surpasses the quality outlet NZZ.

9. What’s next? Media policy considerations

The Swiss information media system is suffering from falling revenues. The main cause is the global transformation in the media sector in the form of the rapid increase in the importance of the global tech intermediaries Google, Facebook and co.. They are depriving the Swiss information media of the lion’s share of advertising revenue. And they channel audience flows to their platforms, where brand loyalty to professional news producers is low, further eroding the already low willingness to pay for news. Against the background of growing awareness of the system-relevant importance of professional information media for the democratic community, there is therefore an urgent need for action. The Federal Council has reacted by presenting a draft of a new Bundesgestz für elektronische Medien (BGeM). The draft legislation contains a number of useful innovations: The recognition of the necessity of direct media promotion must now also be applied to the area of online media. It also makes sense to provide financial support for education and training institutions for media professionals, for self-regulatory organisations (press councils), for non-profit news agencies and for the planned promotion of innovative IT solutions and infrastructures for online media. The latter would facilitate the integration of information media with their journalistic outputs into the online world. In fact - as this Yearbook shows - there are various information providers in Switzerland who have not yet made this leap, or have done so to an insufficient extent. This includes most commercial broadcasters as well as various local and regional newspapers. The promotion of digital infrastructures can help smaller media companies and media start-ups to better manage digitisation.

However, the new Bundesgestz über elektronische Medien (BGeM) is far from sufficient to meet the challenges posed. It even seems quite despondent in parts. Two aspects are problematic. First, the restriction of direct media promotion to online providers that “essentially” produce audio-visual content. Although this Yearbook also shows a trend towards “audiovisualisation”, the complexity of society cannot be depicted in sound and image alone. Online text media that specialise in the production of background information and thus affront the difficult and necessary task of adequate provision of context concerning complex social problems are also worthy of support. The restriction to audio-visual online providers is therefore inappropriate. Instead, online journalism as a whole must be promoted. All the more so since the Federal Council is certainly responsible for online journalism. According to Article 93 of the Swiss Constitution, not only radio and television are areas of legislation on the national level, but also other forms of telecommunications distribution. Secondly, the funding provided is far from sufficient to address the problems described. According to the draft law, 6% of the total

Rank	Media type	Quality score	Change compared to 2016
1	SRF Echo der Zeit	8,26	(–0,1)
2	SRF 10vor10	8,24	**(+0,4)**
3	SRF Rendez-vous	8,21	(+0,1)
4	Wochenzeitung (WOZ)	7,95	neu
5	RTS Le 12h30	7,94	**(–0,4)**
5	Neue Zürcher Zeitung	7,94	(–0,1)
6	Le Temps	7,77	(–0,1)
7	RTS Le Journal	7,63	**(–0,4)**
8	SRF Tagesschau	7,62	**(+0,4)**
9	RSI Radiogiornale 12.30	7,55	(–0,3)
10	NZZ am Sonntag	7,52	(–0,2)
11	RSI Telegiornale sera	7,45	(–0,1)
12	nzz.ch	7,41	(–0,1)
13	srf.ch	7,04	(+0,2)
14	Der Bund	6,98	neu
15	letemps.ch	6,96	(–0,3)
16	Il Caffè	6,93	(+0,1)
16	Weltwoche	6,93	**(–0,4)**
17	Tages-Anzeiger	6,82	**(–0,4)**
18	Luzerner Zeitung	6,77	(+0,3)
19	Tele Ticino Ticino News	6,71	(–0,2)
20	rsi.ch	6,69	(+0,1)
21	rts.ch	6,63	(–0,2)
22	Radio 3i Radiogiornale	6,42	(–0,2)
23	Le Matin Dimanche	6,39	(–0,2)
24	24 heures	6,36	**(–0,6)**
25	Aargauer Zeitung	6,30	(–0,2)
26	Schweiz am Wochenende	6,29	(–0,3)
27	St. Galler Tagblatt	6,28	(+0,2)
28	Basler Zeitung	6,25	**(–0,5)**
29	Léman Bleu Journal	6,24	(–0,3)
29	SonntagsZeitung	6,24	**(–0,7)**
30	bernerzeitung.ch	6,15	**(–0,4)**
31	tagesanzeiger.ch	6,14	**(–0,5)**
32	Südostschweiz	6,10	**(–0,5)**
33	bazonline.ch	6,05	(–0,3)
34	Le Nouvelliste	5,97	(–0,1)
35	Berner Zeitung	5,88	(–0,3)
36	24heures.ch	5,86	**(–0,4)**
37	Corriere del Ticino	5,75	**(–0,4)**
38	luzernerzeitung.ch	5,68	(+0,1)
39	RTN Le Journal	5,65	(–0,1)
40	cdt.ch	5,58	**(–0,8)**
41	L'Express	5,43	(+0,0)
42	tio.ch	5,42	**(–0,6)**
42	Radio 24 News	5,42	**(+0,5)**
43	tagblatt.ch	5,25	(–0,3)
44	TeleBärn News	5,15	(+0,1)
45	20minutes.ch	5,05	(–0,1)
46	20 minuti	5,02	(–0,2)
47	SonntagsBlick	5,01	(+0,0)
48	Nachrichten Radio Central	4,85	(–0,1)
49	20 Minuten	4,84	(–0,1)
50	TeleZüri ZüriNews	4,74	(+0,0)
51	watson.ch	4,73	**(–0,7)**
52	Lematin.ch	4,72	**(–0,8)**
53	Tele 1 Nachrichten	4,69	(–0,1)
54	Blick am Abend	4,65	**(+0,4)**
54	20minuten.ch	4,65	**(–0,6)**
55	Le Matin	4,51	(–0,2)
56	20 minutes	4,46	(–0,1)
57	lenouvelliste.ch	4,32	**(–1,0)**
58	Tele M1 Aktuell	4,08	(–0,1)
59	Blick	4,05	(–0,1)
60	Blick.ch	3,86	**(–0,5)**
61	blickamabend.ch	3,12	**(–0,6)**

Diagram 12: Quality scores of media outlets

The diagram documents the quality scores for 66 Swiss information media. The data base consists in all articles assessed through a random sample during the quality analysis (2017 n = 26 444; 2016 n = 26335).

Interpretation example: The radio broadcast Echo der Zeit takes with 8.26 score points the first rank. Compared to 2016, its performance stayed, with -0.1 points change, almost the same.

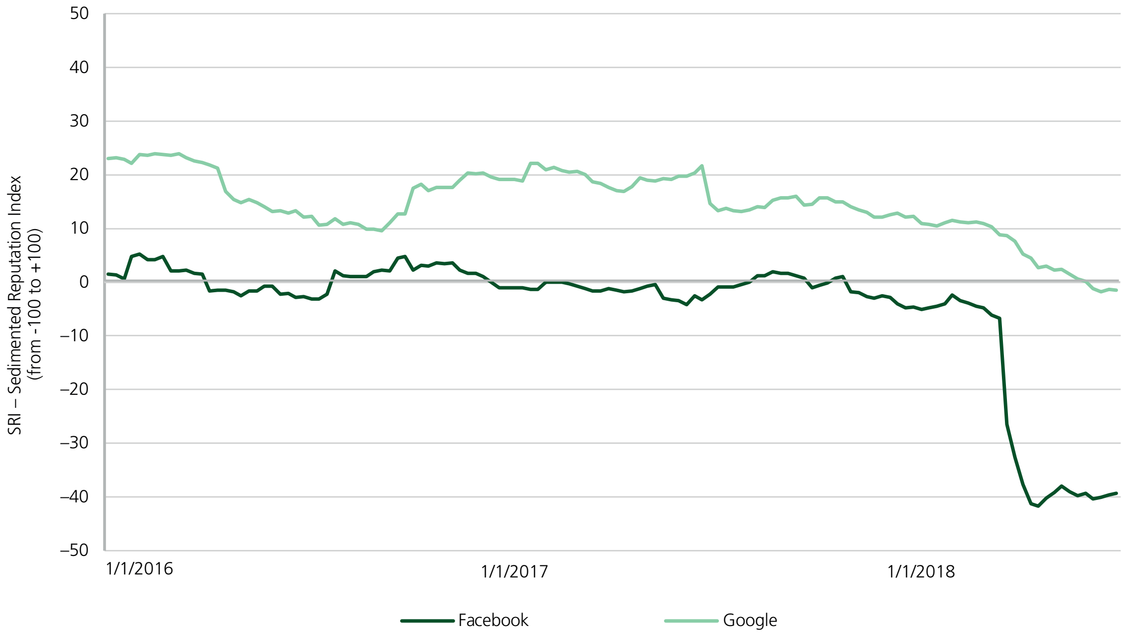

Diagram 13: Reputation evolution of Facebook and Google

The diagram shows the evolution of mediated reputation of Google and Facebook following Sedimented Reputation Index® (SRI®) in the most important Swiss media. The procedure measures the ratio between resonance and reputation daily considering the corresponding values of the previous period under the influence of a forgetting rate. Events with high resonance thus remain decisive for reputation for a longer period than events that did not get a high resonance. The index takes values between -100 (completely negative) and +100 (completely positive) (source: commsLAB/fög).

Interpretation example: The mediated reputation of Facebook evolves in 2018, influenced by the Cambridge Analytica scandal, clearly negatively and shows a value of -39.3 index points SRI® on 30.06.2018.

income from the tax is available for the promotion of electronic media. This is about as much as is already available today for the promotion of private radio and TV stations. The same 6% is therefore intended to support private broadcasters, but also audio-visual online providers. This is only possible if there is a deduction on one side or the other. More money must therefore be destined to direct media promotion for private media providers to effectively counteract the loss of diversity in Swiss journalism. This means that the media tax must not be further reduced in the coming years despite population growth. In addition, serious consideration should be given to levying taxes on advertising revenues from global tech intermediaries and advertising windows from German and French private broadcasters. These funds could be used to set up a Swiss fund for the promotion of information journalism.

Such taxes are justified because the main cause of the structural media crisis is the international/global dynamic. In principle, it is therefore advisable to apply the leverage to global tech intermediaries in particular. In the EU area, two media policy regulations are currently being debated in particular: the law on ancillary copyright and an advertising tax for Google, Facebook and co.. In fact, it is problematic that tech intermediaries have so far largely used high-quality content from professional news media free of charge to place advertisement among specific target groups. The examples of Germany and Spain show, however, that national ancillary copyright law cannot be enforced against the exorbitant market power of tech intermediaries. After the introduction of the ancillary copyright law, Google stopped its newsfeed for Spanish users without further ado. And in Germany, the publishers soon granted Google free licenses for their content to keep the clicks on their own websites high and thus not to lose advertising revenue. An effective ancillary copyright for professionally produced content can only be obtained on an international or even global level, i.e. at eye level with Google, Facebook and co.. Following the recent failure of a European ancillary copyright law in the EU Parliament, this regulatory project should, however, be off the table for the time being. Especially for little Switzerland. Consequently, an advertising tax remains a possibility. It would seem more enforceable, ideally coordinated at the international level. Recently, proposals have been made in Switzerland to tax global tech intermediaries on their advertising revenues. This would create valuable additional funds to expand direct and indirect media promotion in Switzerland. The concern that such media support would lead to a less critical attitude towards the state or even to a state influence on journalistic content is unfounded. This is demonstrated not least by decades of experience in the promotion of private broadcasting based on taxes in Switzerland. And this is also shown by experience in Scandinavian countries, which go much further in terms of direct media promotion than Switzerland, but regularly occupy top positions in Freedom House's media freedom surveys.

The data scandal surrounding Facebook / Cambridge Analytica has also made it clear that the big tech intermediaries change their position primarily when they are scandalized. In fact, our reputation analysis confirms that tech intermediaries are increasingly subject to critical observation by the Swiss media and that events such as the data scandal lead to serious reputation damage (see Diagram I.13). Reputational consequences can promote the self-regulatory tendencies of tech intermediaries and their awareness of the social consequences of their platforms. Because for them, too, business success presupposes an intact reputation. Therefore, global tech intermediaries should be increasingly exposed to a critical discourse about their social responsibility. This includes not letting professional information media, which are indispensable for the democratic community, bleed out by depriving them of indispensable economic grounds. This critical discourse must be conducted in public in an audible and permanent manner. For this purpose, bodies with the power of definition must be created. Recently, a proposal was made to set up an international digital council (Prinzing 2017). Switzerland could pioneer in this domain. In view of the rapid increase in the number of news deprived, who are increasingly turning their backs on news journalism, considerable investments must be made in media literacy. Although the new Lehrplan 21 provides for media competence as a subject, it focuses completely and one-sidedly on technical media competence. Media literacy related to contents, which sensitises people to the fundamental importance of journalism and to differences in quality in the "long tail" public, is neglected. The educational institutions in particular are called upon to promote media literacy. Because if young people and young adults invest less and less time in the use of news, more time must be invested in schools into the use of professional information media. With "Newsup", the Kurt Imhof Stiftung für Medienqualität, which makes this Yearbook possible, has launched a project that serves precisely this goal: to promote media literacy among young people and young adults.

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Sources and methods

The analyses underlying the Yearbook are based on both data gathered specifically for those purposes and also secondary data. The various sources are listed here, along with the various methodologies used:

Content analysis

The quality of reporting is measured using a content analysis conducted at the fög – Research Institute for the Public Sphere and Society / University of Zurich. A quality scoring system was implemented on the basis of this, with each story being coded by trained coders in accordance with scientific conventions (there is no automation of quality assessment). The random sample from 2017 takes 26,444 stories from 66 Swiss media into account. The data from 2015 and 2016 is also used for comparison purposes.

Public surveys

First, again this year, the data from the "Reuters Digital News Report" was considered. This global report contains representative survey data concerning online user behaviour of the population of 37 countries (over 74,000 interviews), including Switzerland. The fög – Research Institute for the Public Sphere and Society / the University of Zurich is the Swiss partner organisation for this major study conducted by the Reuters Institute for the Study of Journalism at the University of Oxford. Some 2,000 Internet users were surveyed from the German-speaking and French-speaking regions of Switzerland. Random samples representative of Internet users aged 18 and over were taken on the basis of online panels (cf. fög 2017, chapter "Methodik"). Second, survey data from the representative yearly media usage survey implemented by fög in collaboration with GfK Switzerland was included into the analyses. In this survey, 3400 online interviews were executed since 2009 each beginning of the year. The core of the survey remained unchanged since 2009, the data series thus span over 10 years (cf. fög 2017, chapter "Methodik"). Third, the Yearbook is based on the survey data of the foundation Stifterverein Medienqualität, which first published the so-called "Medienqualitätsrating (MQR)" in 2016. The project has the objective to promote media quality in Switzerland. The fög is responsible for the module that analyses the quality of reporting of 50 Swiss information offerings. The second module is under the responsibility of the University of Fribourg. It treats the perception of quality among the audience. It was assessed via an online survey (about 1600 interviews) from German-speaking Switzerland and French-speaking Switzerland. The first survey was conducted in February/March 2016, the second in February/March 2018 (cf. mqrschweiz.ch and fög 2017, chapter "Methodik").

Characteristics of the media sector

The studies to ascertain the spread and concentration of information media and the media market are based on circulation figures or reach as measured by the media research organisations WEMF, NET-Metrix and Mediapulse. The data regarding funding of the media comes from the Stiftung Werbestatistik Schweiz and Media Focus.

What is the purpose of the Yearbook?

Since it first appeared in 2010, the aim of the Yearbook has been to deepen the discussion regarding the quality of the media and to promote the awareness for the performance of information journalism for society. The Yearbook will be a resource for people working in the media, those involved in politics, business or academia and anyone with an interest in media trends and media content. The Yearbook is based on the long-held view that the quality of democracy depends on the quality of the media. The Yearbook will provide the public with a benchmark for the kind of journalism they wish to be exposed to, the media makers will have a benchmark for the kind of journalism they want to produce and be responsible for, and politicians will gain a feel for how the media world is developing and for the resources available for information-based journalism in Switzerland.

Our quality concept

This Yearbook is underpinned by a normative concept of quality, which takes it as read that information media do an important job for society as part of a properly functioning democracy. From the functions performed by public communication, it is possible to derive four quality dimensions, which are widely embedded in both academic research and journalistic practice. Firstly, the “relevance” dimension is intended to say something about the ratio of hard news to soft news, and also the weight given to stories regarding matters at an institutional level compared with reporting focused on individual people. The “diversity” quality dimension measures whether events are being reported from many different points of view in terms of both content and geography. “Provision of context” is high where current events are framed in relation to longer-term developments and topical implications. Lastly, the “professionalism” quality dimension includes whether reporting is primarily factual (instead of emotional) and whether it is generated by editorial staff themselves, as well as the level of source transparency.

Who is responsible for the Yearbook?

The Yearbook is produced and published by the fög – Research Institute for the Public Sphere and Society / University of Zurich (www.foeg.uzh.ch). Eight academics and three students are involved in the research and vouch for the quality of the analyses.

Who provides funding and support for the Yearbook?

The Yearbook is funded by the charitable foundation known as the Kurt Imhof Stiftung für Medienqualität (www.kurt-imhof-stiftung.ch) and the University of Zurich. The Board of Trustees comprises the following people: Christine Egerszegi-Obrist, Mark Eisenegger, Barbara Käch, Yves Kugelmann, Fabio Lo Verso, Dick Marty, Oswald Sigg and Peter Studer.

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Where can I find the Yearbook and the studies?

The Yearbook is available in printed form (ISBN 978-3-7965-3923-7) at Schwabe Publishers (www.schwabe-verlag.ch) and appears each autumn. Additionally, a free PDF is made available this year for the first time on: www.foeg.uzh.ch. The accompanying studies “Qualität der Medien” focus on subjects concerning media quality and are also published as free PDF on www.foeg.uzh.ch.

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Schweiz – Suisse – Svizzera

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Über das Jahrbuch Qualität der Medien

Zum neunten Mal erscheint 2018 das Jahrbuch Qualität der Medien – Schweiz Suisse Svizzera. Seit der ersten Ausgabe 2010 liefern die Herausgeber jährlich aktuelle Kennzahlen zu den Mediengattungen Presse, Online / Social Media, Radio und Fernsehen. Die Forschergruppe der Universität Zürich untersucht neben der Entwicklung der inhaltlichen Qualität auch die Nutzungsentwicklung und die Finanzierungsbasis der Informationsmedien. Ebenso ordnen die Wissenschaftler Trends und neue Phänomene wie beispielsweise die fortschreitende Medienkonzentration, die sinkende Vielfalt oder die Bedeutung von Social Media für die Informationsmedien in einen grösseren Kontext ein. Die fundierten Analysen bieten über das Jahrbuch hinaus eine Grundlage für die medienpolitische Debatte in der Schweiz. Das Jahrbuch Qualität der Medien ist eine informative Quelle für Medienschaffende, Führungskräfte aus Politik und Wirtschaft, für die Wissenschaft und alle, die sich mit der Entwicklung unserer Medien und ihrer Inhalte auseinandersetzen wollen. Es will das Bewusstsein für die Qualität der Medien stärken und die Diskussion über den Wandel unserer medialen Öffentlichkeit anregen.

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Herausgeber des Jahrbuchs Qualität der Medien ist das Forschungsinstitut Öffentlichkeit und Gesellschaft (fög). Das fög ist ein assozziertes Institut der Universität Zürich und wurde 1997 gegründet. Das Institut ist auf die Erforschung des Medien- und gesellschaftlichen Wandels spezialisiert.